SUGGESTED STEPS FOR CUSTOMIZATION

While there is no one "right" way to set up your HR Suite, the key steps contained in this document have worked well for many clients.

HR Suite can be accessed at https://hrsuite.hrnonline.com

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For technical support, please contact policysupport@cusolutionsgroup.com.

Customizing Precautions and Guidance

Public Employers & Unionized Workplaces

The HR Suite was primarily written for use by private employers. In many instances, relevant employment laws are very different in the public sector. In some cases, language pertaining to public employers, federal contractors, and sub-contractors is included in the manual as many areas may apply to both private and public employers. Additionally, companies with unionized environments may have considerably different obligations than those addressed in the HR Suite. Although some language for public employers may be included, employers in public and union environments should consult their attorneys for assistance in using this product.

Compliance with Federal, State & Local Law

Although HR Performance Solutions has conducted a great deal of research developing this product, the HR Suite is not designed to be an exhaustive, legally compliant document specific to your company or intended to comply with state and local laws. In other words, we do not assume the role of your legal counsel and, as always, responsibility for compliance with applicable employment laws remains with you.

Once you have customized your HR Suite Policy Manual and Employee Handbook, there may be areas that should be reviewed by you and your attorney to ensure conformity with your organizational needs, state, and local legal requirements as applicable.

Importance of Customization

HR Suite contains generic policies and forms which should be applicable or easily customized to most companies. However, we strongly urge you to modify the materials and/or eliminate (or archive) those that you do not and will not use.

HR Policy Manual vs. Employee Handbook

One of the most common questions we are asked as human resource experts is the difference between an Employee Handbook and an HR Policy Manual.

The answer is -HUGE! Below we have listed some clarifications of the purposes of these two very important HR documents.

<u>HR Policy Manual</u>

- Limited distribution - Intended for the HR department and Managers/Supervisors only.
- Many policies are inapplicable to employees (e.g., I-9, Child Labor, Obtaining References, etc.)
- Guides management and structures managerial actions.
- Promotes consistency throughout the organization.
- Serves as a training tool for Managers.

<u>Employee Handbook</u>

- Informs employees of important policies, rules, procedures, benefits, and rights.
- Reinforces company goals, objectives, and work standards.

- Attempts to protect company from lawsuits by including employment-at-will language and addressing harassment issues and other forms of discrimination.
- Promotes consistent treatment of employees.
- Serves as a summarized guide for employees. The Employee Handbook is not intended to provide specific policy details or procedural steps; rather it's a basic overview.

Suggested Steps for Customization

STEP 1 - Get Trained

HR Suite is fairly intuitive and easy to use; however, as with any software system, simple training can go a long way to help you learn the easiest and most efficient ways to use the system. We recommend reading the “Quick Start Guide” to get familiar with the basic terminology and navigation of the Manual Builder area, and getting training on the system.

Training is offered as both a series of online videos and as a written document (The User’s Guide). The New User Training videos take about 120 minutes from start to finish. Video training can be found on the HR Suite Support Site.

The remaining steps of this guide include some basic instruction on how to perform each suggested step. However, the training resources listed above will provide full training, including tips, best practices, and in depth training on common tasks and functions.

STEP 2 – Add Policies to the Working Manual

HR Suite provides more than 140 model policies. To avoid being overwhelmed, choose 10-15 policies as a starting point, then grow your manual with additional policies as you finish customizing each group of policies.

The Working Manual was set up with the chapter folder structure, but no model policies were added. Use the “Multi-Add to Working from Master” Utility under MANUAL SECTION MANAGEMENT and add in a select set of policies that you are ready to work with. (Note: if your manual has been in use for some time, there may already be policies in the Working Manual.)

Because there are model policies available to fit a variety of organization sizes and industries, there may be policies that are mutually exclusive, meaning if you choose to use a certain policy, there may be another policy that you should not use. The Policy Inclusion Guidance below will give you information on specific areas where mutually exclusive situations may arise.

- **Family Medical Leave Act**

If you **DO NOT** need to comply with FMLA:

	Include	Do Not Include
HR Policy Manual	8011 (Leaves of Absence)	8010 (Family and Medical Leave 8060 (Personal and Other Leaves of Absence)
Employee Handbook	7041 (Leave Policy – Non-FMLA)	7040 (Leaves of Absence)

If you **DO** need to comply with FMLA:

	Include	Do Not Include
HR Policy Manual	8010 (Family and Medical Leave) 8060 (Personal and Other Leaves of Absence)	8011 (Leaves of Absence)
Employee Handbook	7040 (Leaves of Absence)	7041 (Leave Policy – Non-FMLA)

- **Paid Time Off**

If your organization utilizes **Paid Time Off** vs. separate vacation and sick leave:

	Include	Do Not Include
HR Policy Manual	8065 (Paid Time Off)	8070 (Sick Leave) 8080 (Vacations)
Employee Handbook	7045 (Paid Time Off)	7050 (Sick Leave) 7060 (Vacations)

If your organization has separate **Vacation** and **Sick** leave policies and does not utilize a PTO system:

	Include	Do Not Include
HR Policy Manual	8070 (Sick Leave) 8080 (Vacations)	8065 (Paid Time Off)
Employee Handbook	7050 (Sick Leave) 7060 (Vacations)	7045 (Paid Time Off)

- **Financial Institutions**

  Several policies that only apply to financial institutions are included in the HR Policy Manual. If you **ARE NOT** a financial institution:

	Do Not Include
HR Policy Manual	2016 (Diversity for Financial Institutions) 4070 (S.A.F.E. Act) 6072 (Personal Finances) 6075 (Personal Financial Transactions)
Employee Handbook	5079 (Personal Finances) 5081 (Personal Financial Transactions)

STEP 3 – Print Supplemental Documentation

There are several documents that can help make the customization process easier and more efficient. These documents can be found on the HR Suite Support Site.

- **Key Fields Guide**
  Key Fields are bits of information which are important to completing a policy, but will vary from organization to organization. For example: How many hours must an employee work to be eligible for paid vacation time? Not every policy contains Key Fields, but some policies contain many Key Fields. The Key Fields Guide includes a full list of the Key Fields, their location, their number, and a brief description of the information needed. It may be helpful to use this document to gather the necessary information prior to customizing your HR Policy Manual or Employee Handbook. We suggest customizing your HR Policy Manual first then the Employee Handbook.

  State Law Customizing Guide
  The HR Policy Manual and Employee Handbook have been written for **private employers** and to comply with **federal law**. There may be (and in many cases are) different requirements for government employers. The manuals also contain common policies adopted by employers that may go beyond those required by federal law (such as break and leave policies). **NO STATE OR LOCAL LAW ISSUES HAVE BEEN ADDRESSED.** Employment law differs considerably from state to state and in some cases within local jurisdictions. **Therefore, all policies should be reviewed by legal counsel prior to their implementation to ensure that they meet all federal, state, and local requirements.**

  The State Law Customizing Guide seeks to highlight the common areas where state and/or local law must be considered and integrated into the HR Policy Manual and Employee Handbook. The guide is not exhaustive but may be used as a reference for HR Managers.

  HR Suite Policy Guidance
  Select policies within HR Suite contain model policy language based on Federal regulations and guidelines from regulatory agencies, including but not limited to the DOL, Wage and Hour, and EEOC. Other policies contain model policy language not necessarily dictated by federal regulations but generally recommended by employment law attorneys. Some of these policies may need customization (perhaps extensive customization) to fit the

operations and specific policies and benefits of your organization. In addition, many policies may be subject to state specific regulations and guidelines that would require additional customization. This document will provide guidance on a policy-by-policy basis to help you determine the level of customization that would be necessary for each policy.

STEP 4 – Review the Key Fields Guide and Complete Key Fields

Review and gather the required Key Field information and enter it appropriately. Although there are key fields that are common between the Manual and Handbook, key fields must be defined separately for each manual. The Multi-Key Fields Update Utility allows users to quickly update multiple key fields at once for each manual. *Refer to the User's Guide or the New User Training videos for more details on completing Key Field input.*

STEP 5 – Customize Content and Insert New Policies and Text

It is recommended you customize your HR Policy Manual first, then customize the Employee Handbook.

You may wish to add unique policies and paste text you currently have in other sources (Microsoft Word, Excel, etc.). Edits to text and insertions of new policies in the HR Policy Manual do NOT automatically carry over to the Employee Handbook. See the User's Guide or the New User Training videos for more detailed information on editing policies, adding unique policies, and pasting from Word.

Terminology

Terminology differs from company to company. Some companies call their employees "employees", while others may call them "Team Members". Titles for the organization also widely vary. In HR Suite, we refer to the organization as "Credit Union" and the employees as "employees". If you should desire to change this, you can to do a search and replace in each policy.

The Search and Replace icon  allows you to search a single policy for specific text and replace it with new text. This icon is found in the toolbar when editing a policy. This will replace **all instances** of the specific text in that policy– you may choose to use CTRL+F to use your browser's "FIND" tool and view each instance of the specific text to ensure that your policy reads the way you intend.

STEP 6 – Review the State Law Customizing Guide

Review the State law Customizing Guide you printed in step 2. Make any edits in the HR Policy Manual and Employee Handbook that are required to comply with your specific state statutes.

STEP 7 – Customize Your Employee Handbook

Make necessary changes in the Employee Handbook so that it is consistent with the HR Policy Manual and also with your state and/or local law.

STEP 8 – Publish

Publish your HR Policy Manual and Employee Handbook. See the User's Guide or New User Training Videos for more detailed information on the publishing process.

STEP 9 – Post on the Home Page

Make your HR Policy Manual and Employee Handbook available for employee viewing by posting them on the Home Page. See the User's Guide or New User Training Videos for information on posting manuals to the home page.

STEP 10 – Get Familiar With HR Suite

Review the Library and Forms areas of HR Suite to get an understanding of what is included in these services.